Contracting Officer Representative (COR) Training

- COR 1000-1100
- CID 1100-1130
- LUNCH 1130-1300
- PAY AGENT 1300-1400
- FOO 1400-1430
- CERP 1430-1500

Prerequisite Requirements

- Defense Acquisition University **(DAU) CLC 106** – COR With a Mission Focus
- Defense Acquisition University **(DAU) CLC 206** – COR in the Contingency Environment
- Defense Acquisition University **(DAU) CLM 003** – Overview of Acquisition Ethics http://www.dau.mil/default.aspx
- DOD **Combating Trafficking in Persons** Course J3TA-US030
- https://www.us.army.mil/ - ALMS
- OGE Form 450(Confidential Financial Disclosure)

PWS Development

- **Performance Work Statement (PWS)/Statement of Work (SOW):**
  - **Performance-Based Language:**
    - **Tells the contractor what to do**
    - **But not how to do it**
  - **Seek assistance from functional and/or contracting staff**
  - **Complete DA Form 3953 (funding/approval)/from RM**
- **Justification document (operationally dependent)**

Key points: (What you ask for, not what you want)

- ✓ **You set the requirements - contracting officers cannot read your mind**
- ✓ **Do not assume anything - be specific and as thorough as possible**
- ✓ **Use the LOGCAP Support Officer (LSO) for requirements support--LOGCAP**

What is a COR to the Commander?

The COR's key role is to optimize contracted services or construction performance, based on Performance Work Statement (PWS) or Statement Of Work (SOW):

- observe
- document and
- communicate

Think counseling and evaluation

Regional Contracting Center – KAF

As the Government representative appointed by the Contracting Officer, YOU are responsible for the technical monitoring of the contractor's performance, accepting or rejecting the contract services IAW the PWS/SOW, and other contract administration duties IAW your COR appointment letter. The COR has the expertise in the area of contracted effort and possesses the necessary background to evaluate the contractor in

Dual Lines Of Responsibility

Official Appointment/Designation Letter

Functional Chief/Commander (rating chain)

Contracting Officer (appointment letter)

COR

- **Additional duty**
- **Technical Expert**
- **Command's single point of contact to the contractor**

Lines of Responsibility ⟷

COR Authority

COR will often have:

- Command Authority through Chain of Command
  - This DOES NOT provide authority over the contractor to make changes on any contract(s).
- Contract Authority only through the KO IAW the COR Appointment Letter
  - Limitations – based on PWS/SOW

Authority Types

- **Actual Authority (contracting officer)**
  - Written authority by warrant
- **Implied Authority (contracting officer representative)**
  - "usual, customary, & necessary"
- **Apparent Authority**
  -- Government does not recognize

Specific Duties

- Monitor all performance aspects of the day-to-day administration of the contract
- Monitor the contractor's progress and performance, including the submission of required reports or other **documentation**
- Verify the contractor corrects all correctable deficiencies
- Perform acceptance of supplies and services for the Government

- Ensure surveillance checklists and surveillance

Specific Duties

- Maintain liaison and direct communications with both the contractor and the KO
- Recommend contract modifications and termination actions to the KO
- Provide technical interpretation of the requirements
- Maintain a professional distance from the contractor

Specific Duties

- Reject non-conforming goods and/or services within a reasonable time
- Submit the DD Form 250, Material Acceptance and Receiving Report, for vendor payment
- Include complete DD250, Invoice and EFT form
- KAFRCCINVOICES@afghan.swa.army.mil

DD Form 250

This form is a multipurpose report used:

- To provided evidence of Government contract quality assurance
- To provided evidence of acceptance
- As contractor invoice and
- As commercial invoice support

The Process:

- The contractor prepares/forwards the invoice to the COR who will prepare the DD250 using the contract.
- COR verifies the contractor's invoice w/ the DD250 and contract, signs the DD250, and forwards both documents to the contracting officer
- The Contracting Officer will validate the document and forward to finance for payment

INVOICE PROCESS

- COR Receives Invoice From Contractor
- COR Completes DD250
- COR sends documents to Invoice Team:
  - Contractor Invoice & EFT
  - DD250
- DFAS (30days)
- Bank Account (1-2 weeks)
- Contractor Gets Paid (45 days later)

DD Form 250

MATERIAL INSPECTION AND RECEIVING REPORT

Form Approved
OMB No. 0704-0248

The public reporting burden for this collection of information is estimated to average 30 minutes per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing the burden, to the Department of Defense, Executive Services and Communications Directorate (0704-0248). Respondents should be aware that notwithstanding any th a collection of information if it does not display a currently valid OMB control number.

COMPLETED FORM TO THE ABOVE ORGANIZATION.
E INSTRUCTIONS CONTAINED IN THE DFARS, APPENDIX F-401.

Contract and order number

1. PROCUREMENT INSTRUMENT IDENTIFICATION (CONTRACT) NO.	ORDER NO.	6. INVOICE NO./DATE	7. PAGE	OF	8. ACCEPTANCE POINT
		**			

2. SHIPMENT NO.	3. DATE SHIPPED	4. B/L	5. DISCOUNT TERMS
		TCN	

9. PRIME CONTRACTOR	CODE	10. ADMINISTERED BY	CODE

Name and address of vendor

Contracting office

11. SHIPPED FROM *(If other than 9)*	CODE	FOB:	12. PAYMENT WILL BE MADE BY	CODE

Finance office

13. SHIPPED TO	CODE	14. MARKED FOR	CODE

Delivery location

Additional delivery information if necessary (i.e. unit at a FOB)

This must match the information on the vendor's invoice.

DD Form 250

15. ITEM NO.	16. STOCK/PART NO. DESCRIPTION (Indicate number of shipping containers - type of container - container number.)	17. QUANTITY SHIP/REC'D*	18. UNIT	19. UNIT PRICE	20. AMOUNT

This should match the information from the original contract.

ption: block 17 should reflect the actual quantity received and/or accep
he shipment is incomplete or if not all items are accepted by the custom

21. CONTRACT QUALITY ASSURANCE

SIGN TWICE!!!

22. RECEIVER'S USE

Quantities shown in column 17 were received in apparent good condition except as noted.

DATE RECEIVED

SIGNATURE OF AUTHORIZED GOVERNMENT REPRESENTATIVE

TYPED NAME:

X the "Acceptance" block, date, and sign.

Completing this block is the customer's verification that the items meet the contract's standards.

Completing this block verifies the customer received the quantity of items listed in block 17.

23. CONTRACTOR USE ONLY

Note: More than one DD 250 will be required for a split supply shipment or continuing services.

The Invoice

ASTRO
Systems, Inc.
WORLD-WIDE TELECOMMUNICATIONS ENGINEERING

February 4, 2005
INVOICE No. 1637-001

US Army Corps of Engineers Financial Center
Attn: CEFC-FP
5722 Integrity Drive
Millington, TN 38054-5005
CEFC-P0invoices@fc02.usace.army.mil

Contract No. W914NS-05-D-9006 Order No. 0

INVOICE

CLIN	Description	Qty	UOM	Unit	Total
0009	Desktop Computer w/LCD Monitor installed	80	ea	4,882.00	390,560.00
0010	Laptop Computers installed	50	ea	5,191.00	259,550.00

TOTAL

Terms: Net ten days

Payment to be made by EFT to:
SunTrust Bank
ABA 061-000-104
Account 000 24 99 35
Astro Systems Cage Code 0HS47

Notify to report defective invoice:
Astro Systems Inc.
7979 Old Georgetown Road
Bethesda, Maryland 20814

John Feley for
Ralph L. Miller

Invoice number and date required

Contract number should appear on invoic

Item description should match contract

Invoice and DD 250 dollar amounts should match

Signature required

Electronic Funds Transfer Form (EFT)

THIS FORM MUST BE TYPED USING SIZE FONT 14 !!! DO NOT HAND-WRITE !!! -- !!! لا تكتب باليد !!! يجب ان تطبع في هذا النموذج !!!

General Information		معلومات عامة
Contract Number		رقم العقد
Invoice Number		رقم قائمة الاجور
EFT Amount		المبلغ
This information must match the company's account on file at the bank		يجب ان تطابق المعلومات التالية لما هو موجود فس سجلات المصرف
Name Reflected on Bank Account		الاسم كما هو مسجل في حساب المصرف
Bank Account Number		
Account Type	**Checking account**	
Banking Information		
Bank Name		
SWIFT Code (All Vendors - 8 or 10 digits)		10 مراتب)
ACH Routing Number (US Vendors - 9 digits)		رقم الراوتنغ (للمقاولين الامريكيين فقط) (9 مراتب)
IBAN		رقم الحساب المصرفي الدولي
Bank Branch Name		اسم الفرع للمصرف
Bank Address		عنوان المصرف
Bank City		اسم المدينة التي يقع فيها المصرف

Bank Account Name and Company Name must match

COR's "Magic Words" to the Contractor:

"You are hereby notified that I DO NOT have the authority to direct you in any way to alter your contractual obligations. Further, if the Requiring Unit, as a result of the information obtained from today's discussion desires to alter your contract requirement, then formal changes will be issued in writing and signed by the Contracting Officer (KO)."

"What not to do"

- Award, agree to, or sign any contract, delivery order or task order. All contractual agreements, commitments, or modifications shall be made only by the KO
- Make any commitments or otherwise obligate the Government to make any changes to the contract
- Grant deviations from or waive any terms and conditions of the contract
- Authorize the use of overtime
- Permit DFAC, PX, Hospital, MWR access

"What not to do"

- Impose or place a demand upon the contractor to perform any task or permit any substitution not specifically provided for in the contract
- Approve travel and relocation expenses over and above that provided for in the contract
- Increase the dollar limit of the contract, or authorize work beyond the dollar limit of the contract, or authorize the expenditure of funds
- Give direction to the contractor or to the employees of the contractor except as provided for in the contract

"What not to do"

- Change the period of performance
- Authorize the purchase of equipment, except as authorized under the contract
- Authorize the furnishing of Government property, except as required under the contract
- Authorize subcontracting or the use of consultants
- Approve shifts of funding between line items of the budget

Unauthorized Commitment

- **FAR 1.602-3** – an agreement that is not binding solely because the Government representative who made it lacked the authority to enter into that agreement on behalf of the Government.

- **Ratification** – the act of approving an unauthorized commitment by an official who has the authority to do so…the KO.

- **COR (YOU)** may be held personally fiscally liable for the dollar value of the unauthorized commitment that they make

What Can I Do To Avoid Committing A Unauthorized Commitment?

- Do NOT let the Chain of Command pressure you to commit the Government
- Don't let vendors pressure you through sales tactics and product trials
- When conducting market research, be certain you make no commitments
- Plan ahead for the supplies and services you need
- Contact your servicing contracting office for advice on contracting matters
  - Contact them immediately if you believe you may be involved in a UC
- Think before you "buy"

Ethics and the COR

- It is always better to ask permission than forgiveness
  - Call KO (This is Not going to happen)

- No one on the ground, other than the KO, can "authorize" anything relating to a contract

Ethics and the COR

- Do not accept any of the following items from a contractor that you are appointed to oversee:
  - Gifts
  - Money
  - Job Offers
  - “Favors”
- If you are offered any of the above from a contractor you must report it to the KO immediately.

COR Pre-Award Responsibilities

Will vary with the size and type of contract – In General:

- Document unit requirements
- Assist in preparing the procurement package to include PWS/SOW and Independent Government Estimate (IGE) to include Market Research
- Prepare, staff, and submit Purchase Requests (PR&C)
- Verify availability of Funding – Submit packet to request funds
- Assist the KO in the Technical Evaluation of proposals from contractors

Joint Acquisition Review Board (JARB)

Step 1: Follow JARB Checklist

Step 2: Develop Letter of Justification

Step 3: Get Three Quotes – Make Summary

Step 4: Conduct Lease vs. Buy Analysis (For NTV, ATV, MHE)

Step 5: For Services

- Develop Statement of Work
- Develop Quality Assurance Plan

Step 6: Legal Review

Step 7: Required COR Training

Step 8: PR&C (DA Form 3953 Word or PureEdge)

http://jsc-a.rsouth.afghan.centcom.mil "acquisitions"

Joint Acquisition Review Board (JARB)

- USFOR-A - Tuesdays
  - CW2 Ralph Brown
- RC-South/82nd AB – Wednesdays
  - Mr. Nathan S. Taylor

PWS Development

- **Performance Work Statement (PWS)/Statement of Work (SOW):**
  - **Performance-Based Language:**
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- ✓ **Do not assume anything - be specific and as thorough as possible**
- ✓ **Use the LOGCAP Support Officer (LSO) for requirements support--LOGCAP**

Basic Illustration

- This is what you nee

- You say, “Yellow custom car”

- You get this:

Contractor met requirements- Are you happy?

Regional Contracting Center – KAF

- RCC cancels the solicitatio cost the government time and money, and re-solicit:

- You say, “Yellow custom car w/4 wheels/more than 1 seat”

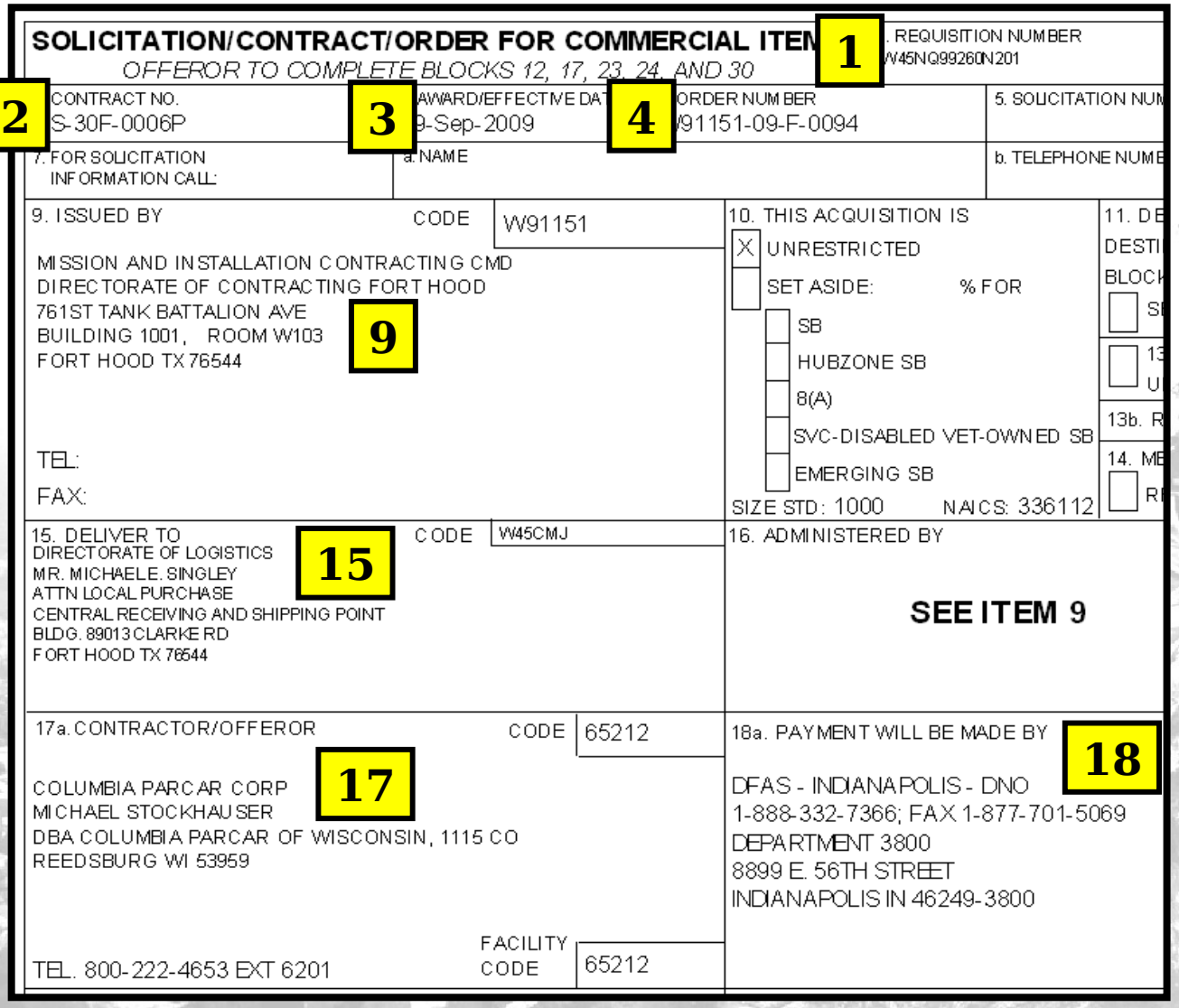
- You get this:

Contractor met requirements again- Still not happy

KAF RCC

- First in, first out
- Senior Contracting Official Afghanistan (SCO-A) determines priorities, not us!
- 30 days to award contract
- Contractor gets time for mobilization

How to read a Contract



SOLICITATION/CONTRACT/ORDER FOR COMMERCIAL ITEM **1** . REQUISITION NUMBER W45NQ99260N201

OFFEROR TO COMPLETE BLOCKS 12, 17, 23, 24, AND 30

2 CONTRACT NO. S-30F-0006P | **3** AWARD/EFFECTIVE DA 9-Sep-2009 | **4** ORDER NUMBER W91151-09-F-0094 | 5. SOLICITATION NUM

7. FOR SOLICITATION INFORMATION CALL: | a. NAME | b. TELEPHONE NUME

9. ISSUED BY CODE W91151

MISSION AND INSTALLATION CONTRACTING CMD
DIRECTORATE OF CONTRACTING FORT HOOD
761ST TANK BATTALION AVE
BUILDING 1001, ROOM W103 **9**
FORT HOOD TX 76544

TEL:
FAX:

10. THIS ACQUISITION IS

[X] UNRESTRICTED
[ ] SET ASIDE: % FOR
[ ] SB
[ ] HUBZONE SB
[ ] 8(A)
[ ] SVC-DISABLED VET-OWNED SB
[ ] EMERGING SB

SIZE STD: 1000 NAICS: 336112

11. DE DESTI BLOCK [ ] S [ ] 13 U 13b. R 14. ME [ ] R

15. DELIVER TO **15** CODE W45CMJ
DIRECTORATE OF LOGISTICS
MR. MICHAELE. SINGLEY
ATTN LOCAL PURCHASE
CENTRAL RECEIVING AND SHIPPING POINT
BLDG. 89013 CLARKE RD
FORT HOOD TX 76544

16. ADMINISTERED BY

SEE ITEM 9

17a. CONTRACTOR/OFFEROR CODE 65212 **17**

COLUMBIA PARCAR CORP
MICHAEL STOCKHAUSER
DBA COLUMBIA PARCAR OF WISCONSIN, 1115 CO
REEDSBURG WI 53959

TEL. 800-222-4653 EXT 6201 FACILITY CODE 65212

18a. PAYMENT WILL BE MADE BY **18**

DFAS - INDIANAPOLIS - DNO
1-888-332-7366; FAX 1-877-701-5069
DEPARTMENT 3800
8899 E. 56TH STREET
INDIANAPOLIS IN 46249-3800

1. Original PR number
2. Contract number
3. Award date
4. Order number
9. Contracting office
15. Delivery address
17. Vendor/contractor
18. Finance/pay office

How to read a Contract

19. ITEM NO.	20. SCHEDULE OF SUPPLIES/ SERVICES	21. QUANTITY	22. UNIT	23. UNIT PRICE	24. AMOUNT

19-24: Description of supplies/services purchased. This information may be listed on or immediately following page 2.

25. ACCOUNT … t. Use Only)

See Schedule

26: Total award amount

☐ 27a. SOLICITATION INCORPORATES BY REFERENCE FAR 52.212-1. 52.212-4. FAR 52.212-3. 52.212-5 ARE ATTACHED. ADDENDA ☐ ARE ☐ ARE NOT ATTACHED

☐ 27b. CONTRACT/PURCHASE ORDER INCORPORATES BY REFERENCE FAR 52.212-4. FAR 52.212-5 IS ATTACHED. ADDENDA ☐ ARE ☐ ARE NOT ATTACHED

28. CONTRACTOR IS REQUIRED TO SIGN THIS DOCUMENT AND RETURN 0 COPIES

☐ TO ISSUING OFFICE. CONTRACTOR AGREES TO FURNISH AND DELIVER ALL ITEMS SET FORTH OR OTHERWISE IDENTIFIED ABOVE AND ON ANY ADDITIONAL SHEETS SUBJECT TO THE TERMS AND CONDITIONS SPECIFIED HEREIN.

29. AWARD OF CONTRACT: REFERENCE GSA Quote RFQ416381-IEO

☒ OFFER DATED 23-Sep-2009 . YOUR OFFER ON SOLICITATION (BLOCK 5), INCLUDING ANY ADDITIONS OR CHANGES WHICH ARE SET FORTH HEREIN, IS ACCEPTED AS TO ITEMS: SEE SCHEDULE

30a. SIGNATURE OF OFFEROR/CONTRACTOR	31a. UNITED STATES OF AMERICA (SIGNATURE OF CONTRACTING OFFICER)	31c. DATE SIGNED
		p-2009

30: Vendor's signature

31: Contracting officer's signature

30b. NAME AND TITLE OF SIGNER (TYPE OR PRINT)	30c. DATE SIGNED	31b. NAME OF CONTRACTING OFFICER (TYPE OR PRINT)

How to read a Contract

ITEM NO	SUPPLIES/SERVICES	QUANTITY	UNIT	UNIT PRICE	AMOUNT
0001		5	Each	$2,234.68	$11,173.40

Air Compressor, 10 HP
FFP
BelAire Compressor Model 5312H Part No. 8090250046 Two Stage Electric Air Compressor 10HP 208-230/460 Volt Three Phase 32/16 Amp with Magnetic Starter 37.23 ACFM @ 100 PSI 35.37 ACFM @ 175 PSI 175 PSI Max Pressure Cast Iron Cylinder Disc Valves 120 Gallon ASME Horizontal lTank 3/4" Outlet Dim: 77"L x 26"D x 58-1/2"H Shipping Weight: 705 Lbs Warranty: 2 Full Years
FOB: Destination
PURCHASE REQUEST NUMBER: W45CMJ92261300
ADDITIONAL MARKINGS: IPBO, DOL
BLDG 89009
MR. Moss

NET AMT $11,173.40

ACRN AA
CIN: W45CMJ922613000001

Complete description of each item:
This is the basis for the COR's inspection and acceptance of the supplies and/or services.

DELIVERY INFORMATION

CLIN	DELIVERY DATE	QUANTITY	SHIP TO ADDRESS	UIC
0001	14-OCT-2009	5	DIRECTORATE OF LOGISTICS MICHAEL E. SINGLEY CENTRAL RECEIVING AND SHIPPING POINT BUILDING 49015, SANTA FE AVENUE FORT HOOD TX 76544 254-287-7572 FOB: Destination	W45CKX

NLT delivery date and address

COR Post-Award Responsibilities

Will vary with the size and type of contract – In General:

- Monitor and document contractor's performance in accordance with the requirements, terms and conditions of the contract and agreed schedule.
- Maintain Contract Information Security
- Inspect supplies and services to determine acceptability – Reject those that do not meet the contract requirements and standards.
- Report results to the Contracting Officer at least monthly.
- Validate contractor's reimbursable purchases are actually received before being billed to the Government(Contractor Invoice).
- Maintain COR files

COR Work Plan

- Administrative info (Contract Number, etc)
- Documenting contractor's performance

➢ Working File:

COR nomination and appointment
COR training documents
Copy of the contract and modifications
Notice of award and to proceed
Minutes of post-award meeting
List of POCs for gov't and contractor
List of applicable regulations
Quality Assurance Surveillance Plan(QASP)
Security requirements/clearances/passes
Correspondence on contract
Surveillance documentation
Invoices/receipts
GFP documents

COR Things to Remember

- Do Not Promise or authorize more work
- Do Not Get involved with subcontractors
- Do Not Modify the contract
- Do Not Disclose source selection information
- Do Not Divulge budget information
- Do Not Grant deviations or waivers of contract terms and conditions
- Do Not Pass on duties to anyone else (no delegations)
- Do Not accept gifts, cash, job offers, or “favors” from the contractor

COR Contract Info Security

- Contract Information is always sensitive data

- Do not share contract data with anyone except the CO, KO, Quality Assurance Personnel, and the prime contractor (listed on the contract) employees

- Insurgent forces target contractors who do business with the
U. S. Government and Coalition Allies.

- Disclosure of contractor company names identifies these firms as doing business with the U. S. Government and can place the lives of the

Questions?

KAF/RCC COR POC Information

1Lt Jennifer Hutchison
Jennifer.hutchison@afghan.swa.army.mil
Desk: 318-421-7159

References

gu

DoD FAR Supplement

Money as a Weapons System

QUESTIONS?